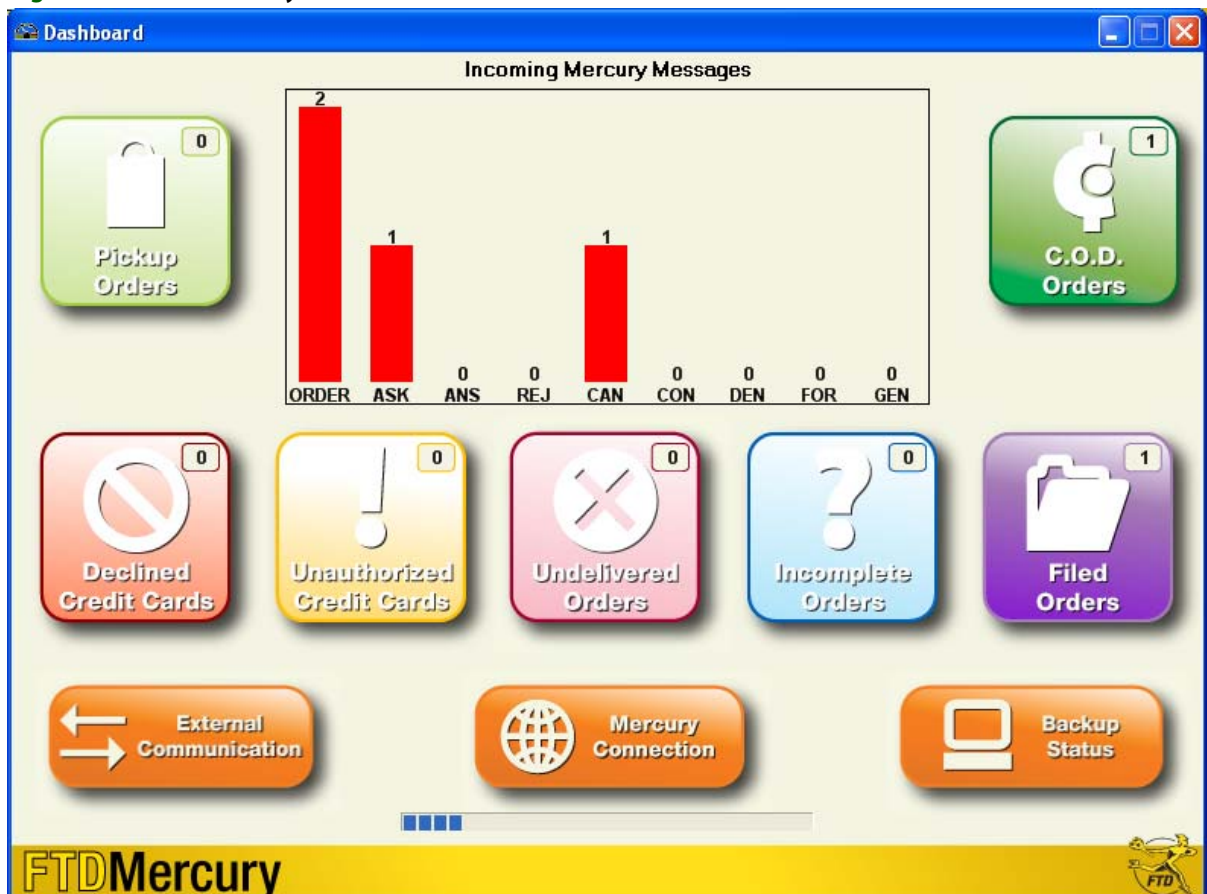


# Dashboard

Designed to give you immediate visibility into today's orders and messages, the FTD Mercury Dashboard allows you to quickly review important information about your store so you can make day-to-day decisions about your business. It also can help you determine the tasks you still need to perform before closing your shop at the end of the day.

The Dashboard is a snapshot of today's activities; messages for past or future dates are not reflected in the Dashboard. Additionally, the order indicators for C.O.D., pickup, and undelivered orders are only for today's orders. However, declined credit cards, unauthorized credit cards, incomplete orders, and filed orders reflect the number of these order types regardless of the date.

**Figure 25-1: FTD Mercury Dashboard**



At the end of each day, you should ensure that no order indicators have items associated with them (that is, the number at the top right of the indicator should be zero and the color should be muted). Additionally, you should ensure there are no Order messages in the Incoming Mercury Messages

chart (that is, you've attached or rejected all incoming orders), you have sent an ANSWER to all incoming ASK messages, and you have sent a CONFIRMATION or DENY message in response to all incoming CANCEL message.

**NOTE**      ANS, REJ, CON, DEN, FOR, and GEN messages are listed for your information. You cannot reduce these; the counters will reset the next day.

If your Dashboard is clear (aside from the ANS, REJ, CON, DEN, FOR, and GEN messages), you can proceed to other end of day tasks, such as performing z-out transactions, balancing your cash drawers, and preparing your bank deposit.

## Enabling Dashboard

Before you can use the Dashboard, you must enable it in Mercury Administration. This allows all terminals to access Dashboard if configured to do so.

- » [Enabling Dashboard in Mercury Administration](#)
- » [Configuring Terminals to Display the Dashboard](#)
- » [Opening Dashboard](#)

## Enabling Dashboard in Mercury Administration

**TASK**      To enable the FTD Mercury Dashboard:

- 1 In **Mercury Administration**, double-click on the **System Folder** icon.
- 2 Double-click on the **Advanced Settings** icon. The **Advanced Settings** screen opens.
- 3 Select the **Monitor Dashboard Events** box.
- 4 In the **Events Polling Interval** field, enter the number of minutes you want the Dashboard to wait before it refreshes. This can be from 1 to 15 minutes, although FTD recommends you leave this setting at its default 1 minute interval.
- 5 Click **Apply** to save your changes before exiting this screen.

## Configuring Terminals to Display the Dashboard

Once you have enabled Dashboard in Mercury Administration, it will be available at all FTD Mercury terminals. You must set each terminal you want to access the Dashboard from to display the Dashboard.

**TASK**      To configure a terminal to display the Dashboard:

- 1 In **FTD Mercury**, from the **Tools** menu, click **Settings**. The **FTD Mercury Configuration** window opens.
- 2 Select the **Display Dashboard** box.
- 3 Click **Save**.

## Opening Dashboard

**TASK**      To open the Dashboard on a terminal where you are allowing Dashboard display:

Double-click the **Mercury Dashboard** icon on the FTD Mercury desktop.

You can also minimize the Dashboard to the Windows Taskbar by clicking the **Minimize** button on the Dashboard title bar (at the top of the window). If the Dashboard is minimized, it will flash if there is a change in status after it refreshes.

## Events that Cause Dashboard to Flash when Minimized

When Dashboard is minimized in the Windows Taskbar, most events will cause the Dashboard to flash if there is a change in status after it refreshes. The following table shows you which events do and do not cause a flash when the Dashboard is minimized:

**Table 25-1:** Events that Cause Dashboard to Flash when Minimized

Indicator	Causes Dashboard to Flash when Minimized?
FTD Order	Yes
ASK Message	Yes
ANSwer Message	Yes
REJect Message	Yes
CANcel Message	Yes
CONfirmation Message	<b>No</b>
DENy Message	Yes
FORward Message	<b>No</b>
GENeral Message	<b>No</b>
Pickup Order for Today	Yes
C.O.D. Order for Today	Yes
Declined Credit Card	Yes
Unauthorized Credit Card	Yes
Undelivered Order for Today	<b>No</b>
Incomplete Order	Yes
Filed Order	Yes
External Communication	Yes
Mercury Connection	Yes
Backup Status	Yes

## Dashboard Information

When you open Dashboard, there is a lot of information right in front of you. This information can help you make decisions on what needs to be done, or help you identify problems right when they happen, instead of finding out hours or days later (or maybe never finding out).

The Dashboard is a snapshot of today's activities; messages and orders that are for past or future dates are not reflected in the Dashboard.

There are three main information areas on the dashboard:

- » [Incoming Mercury Messages Chart](#)
- » [Order Indicators](#)
- » [Communication Status Indicators](#)

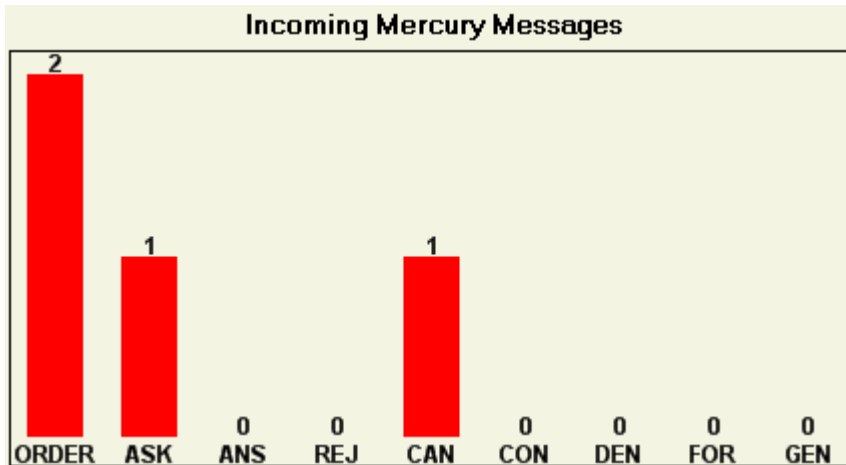
The Dashboard refreshes based on a polling interval set in the Advanced Settings screen in Mercury Administration. Typically, this is set to refresh every minute. At the bottom of the screen, below the

status indicators, a progress bar updates indicating how long until the next refresh. When the bar fills, the Dashboard contacts the FTD Mercury server for updated information.

## Incoming Mercury Messages Chart

The Incoming Mercury Messages chart is located at the top center of the Dashboard. It is a graphical representation of the number of incoming messages of different types you have received today. In the case of Orders, ASK messages, and CANcel messages, it reflects the number of these message types received today that you need to take action on.

Figure 25-2: Incoming Mercury Messages Chart



The chart displays the following message types:

- » **ORDER:** Incoming orders received on the current date that have not been attached or rejected.
- » **ASK:** Incoming ASK messages received on the current date that do not have a corresponding ANSwer messages.
- » **ANS:** All incoming ANSwer messages received on the current date.
- » **REJ:** All incoming REJect messages received on the current date.
- » **CAN:** Incoming CANcel messages received on the current date that do not have a corresponding CONFirm or DENy message.
- » **CON:** All incoming CONFirm messages received on the current date.
- » **DEN:** All incoming DENy messages received on the current date.
- » **FOR:** All incoming FORward message received on the current date.
- » **GEN:** All GENeral message received on the current date.

The chart includes the number of each message type directly below the graphical bar and above the label.

By taking action on Orders, ASK messages, and CANcel messages, you can reduce the number of messages in this chart. For example, if you attach an incoming order, it will no longer appear under the Order bar of the chart. Likewise, if you send an ANSwer message to reply to an ASK message, the ASK message will be removed from the chart. In addition, if you send a CONFirm or DENy message to a CANcel message, the CANcel message will be removed from the chart.

## Order Indicators

In addition to the Incoming Mercury Messages chart, the Dashboard also includes several order indicators, which provide visual cues for specific order types, statuses, and potential issues for today. Dashboard includes the following order indicators:

- » [Pickup Orders](#)
- » [C.O.D. Orders](#)
- » [Declined Credit Cards](#)
- » [Unauthorized Credit Cards](#)
- » [Undelivered Orders](#)
- » [Incomplete Orders](#)
- » [Filed Orders](#)

Each order indicator has two possible states. If there are orders that fit the criteria the indicator measures, the indicator will be a bright color, and the counter will have a value greater than 0. If there are no orders that fit that criteria, the counter will be 0 and the indicator color will be a muted version of the bright color.

After the Dashboard polls the server, if there is any change in activity, the counters will update for each indicator and the indicators may light up or dim.

### Pickup Orders

The Pickup Order indicator lets you know how many orders there are assigned to pickup delivery zones with today's delivery date (that is, how many orders are marked for pickup today). When there are one or more orders, the Pickup Orders indicator will light up and appear as a bright lime green. The actual number of pickup orders that are waiting appears in the counter area.

**Figure 25-3: Pickup Orders Indicator (with and Without Items)**



Once an order is picked up and completed (that is, the Pickup order is marked as delivered), the order no longer appears in the Pickup Orders counter; on the next Dashboard polling interval, the change will be reflected—reducing the counter and, if the counter is 0, dimming the indicator.

If a pickup order was filed for completing later, only the Filed Orders indicator lights up. Likewise, if a pickup order is for C.O.D., only the C.O.D. Orders indicator lights up.

### C.O.D. Orders

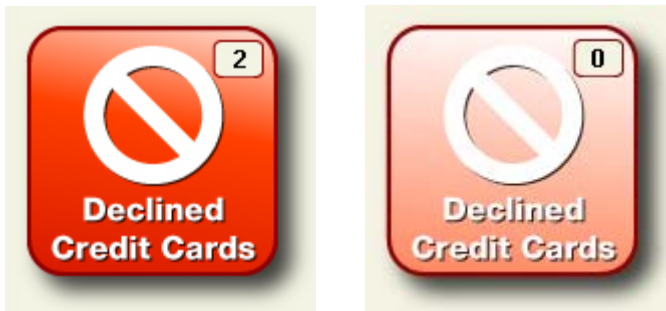
The C.O.D. Orders indicator lets you know how many orders in your shop are currently marked as C.O.D. for today's date. If an order is for C.O.D. and for pickup, only the C.O.D. Orders indicator lights up.

**Figure 25-4: C.O.D. Orders Indicator (with and Without Items)**

When there are orders marked as C.O.D. for today, the indicator appears in a bright green color and the number of orders appears at the top right of the indicator. When there are no C.O.D. orders remaining (that is, all have been completed), the indicator dims to a light green.

## Declined Credit Cards

The Declined Credit Cards indicator displays the number of orders in your system where the credit card has been declined. As long as the order has not been canceled, the declined order will be included in the numerical indicator box at the top right of the indicator. Once the order is canceled, or the order is completed with different payment information, the declined credit card will no longer be reflected in the Dashboard.

**Figure 25-5: Declined Credit Cards (with and Without Items)**

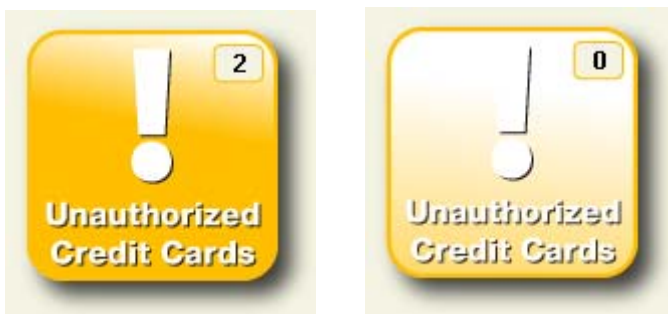
When there are orders with declined credit cards, the indicator appears in a bright red color and the number of orders appears at the top right of the indicator. When the orders have been processed with another payment method or cancelled, the indicator changes to a light red.

## Unauthorized Credit Cards

The Unauthorized Credit Cards indicator displays the number of orders in your system that were paid for with credit cards where the credit card could not be authorized. This can happen if there are communication problems between your shop and the credit card authorization center. If this happens, you must resend the credit card transaction.

Once the transaction is authorized, or if the payment is updated or the order is canceled, the unauthorized credit card will no longer be reflected in the Dashboard.

**Figure 25-6: Unauthorized Credit Cards (with and Without Items)**



When there are orders with unauthorized credit cards, the indicator appears in a bright yellow color and the number of orders appears at the top right of the indicator. When all credit card authorization has taken place, the indicator turns a pale yellow.

## Undelivered Orders

The Undelivered Orders indicator lets you know how many orders for today are undelivered. When orders are marked as delivered (either in the order itself, in Ticket Search, or in Mercury Delivery), the Dashboard will reflect the change.

**Figure 25-7: Undelivered Orders (with and Without Items)**



When there are undelivered orders for today, the indicator appears in a bright berry red color and the number of undelivered orders appears at the top right of the indicator. When all orders for the day have been delivered, the indicator turns to a light red.

## Incomplete Orders

The Incomplete Orders indicator lets you know how many orders in your system are currently marked as incomplete. Perform a Ticket Search by Status to open these orders and complete them. If you complete or cancel an incomplete order, it will no longer be reflected in the Dashboard.

**Figure 25-8: Incomplete Orders (with and Without Items)**





When there are incomplete orders, the indicator appears in a bright blue color and the number of incomplete orders appears at the top right of the indicator. When there are no incomplete orders, the indicator dims to a light blue.

## Filed Orders

The Filed Orders indicator lets you know how many orders are currently filed in your store. You should perform a Ticket Search by Status to locate filed orders and complete them or cancel them to reduce the Filed Orders count.

If an order for pickup today is filed, only the Filed Orders indicator lights up; the Pickup Orders indicator does not light up.

**Figure 25-9: Filed Orders (with and Without Items)**



When there are filed orders, the indicator appears in a bright purple color and the number of filed orders appears at the top right of the indicator. When there are no filed orders, the indicator dims to a light purple.

## Communication Status Indicators

At the bottom of the dashboard, there are three communication status indicators:

- » [External Communication](#)
- » [Mercury Connection](#)
- » [Backup Status](#)

All status indicators are bright orange; changes in status are highlighted by the addition of a large red x over the icon when there is an issue.

## External Communication

The External Communication indicator lets you know if there is an issue with external communication, which can affect fax operations, email, credit card processing, Mercury Messages, and wireless GPS. If there is an issue, the External Communication indicator will have a large red x over the icon.

**Figure 25-10: External Communication Status Indicator (Normal and With Connection Problems)**





Should there be a problem with external communication, you should try to relaunch external communications for FTD Mercury.

**TASK To relaunch external communications:**

On the **Windows Start** menu, point to **All Programs**, then to **FTD Software**, and click **External Communications**.

If, after the next Dashboard refresh (polling interval), the External Communication indicator still has a red x over it, contact the Mercury Technology Assistance Center to resolve the problem.

## Mercury Connection

The Mercury Connection status indicator monitors the connection of your server to the Mercury Network.

**Figure 25-11: Mercury Connection Status Indicator (Normal and with Connection Problems)**



If your system loses connection to the Mercury Network, the icon appears with a large red x over the icon. Should this happen, you should send a GENeral message to FTD to see if that allows FTD Mercury to reestablish its connection to the Mercury Network.

**TASK To send a GENeral message to check for Mercury Network connectivity:**

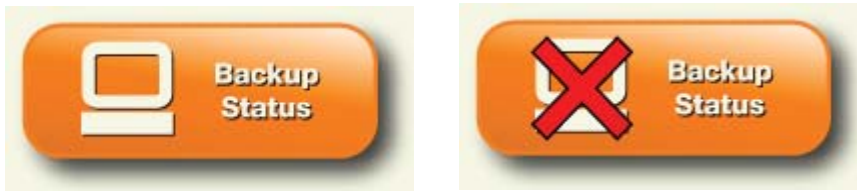
- 1 In FTD Mercury, on the **Mercury Message** menu, click **General (Gen)**. The **General Message Detail** window opens.
- 2 In the **Filling Florist** field, enter 90-5034AA for the florist code.
- 3 When a message appears stating 90-5034AA belongs to FTD, Inc. Transmit with this code? appears, click **Yes**.
- 4 From the **Priority** list, select **Express**.
- 5 In the **Text or Reason** field, enter Test for Mercury Connection.
- 6 From the **Operator** list, select your employee name.
- 7 From the **Sending Florist** list, ensure your store is selected.
- 8 Click **Send**.

A verified copy of the message should print out on your Mercury printer within a few minutes. If a verified copy prints, you have a connection to the Mercury Network. If the Mercury Connection status indicator indicates there is a problem after the next Dashboard refresh (polling interval), contact the Mercury Technology Assistance Center for help in resolving the issue.

## Backup Status

The Backup Status indicator lets you know at a glance if your FTD Mercury backup is up-to-date. If the previous night's automatic backup did not take place as scheduled, the Backup Status indicator will have a large red x over the icon.

**Figure 25-12:** Backup Status Indicator (Normal and with a Backup Problem)



If the Backup Status indicator has a red x over the icon for two consecutive days, it indicates there is a problem with your backup. You should contact the Mercury Technology Assistance Center to resolve the issue.